

TRANSMITTAL SLIP

JAN 1975

TO: DD/Pers/P&C

ROOM NO.
626BUILDING
Chamber of Commerce

REMARKS:

For comment please.

FROM: Director of Personnel

ROOM NO.

BUILDING

EXTENSION

FORM NO. 241
1 FEB 55REPLACES FORM 36-8
WHICH MAY BE USED.

(47)


21 January 1975

MEMORANDUM FOR: Members of the Senior Personnel Resources Board

SUBJECT : Career Management of Clericals in the Directorate for Administration

1. At the DD/A's morning staff meeting on 21 January 1975 it was announced that you would be receiving a copy of a draft reply to the requirement from the Agency's Management Committee that each Career Service conduct a review on how best to proceed to develop a Career Management System for clerical personnel.



2. Attached is a proposed clerical career management plan for this Directorate. Please review this draft so that it can be discussed by the SPRB members in the near future.


Career Management Officer
Deputy Director for Administration

STAT

Attachment

cc:


Mr. Donnalley


Career Management of Clericals
In the Directorate for Administration

A. Policy

1. The new approaches to personnel management recommended by the Personnel Approaches Study Group, endorsed by the Management Committee, and approved by the Director established one career service for the Directorate for Administration and charged the Deputy Director for Administration with the responsibility for the career management of all Directorate personnel.

2. In order to provide a systematic career management program for all Directorate clerical personnel I am making the Head of each Career Sub-Group primarily responsible for administering the clerical personnel assigned to the Career Sub-Group who carry ^{his} Sub-Group indicator (i.e., MP, MF, ML).

3. Clerical Evaluation Panels in the Sub-Groups will provide assistance and recommendations to the Head of the Sub-Groups in the implementation of a Directorate-wide clerical career management program. A Clerical Advisory Committee will be a point of reference at the Directorate level for coordination of efforts by the Sub-Group panels to ~~foster the maximum uniformity of~~ ^{unify} procedures throughout the Directorate and to facilitate inter-Sub-Group movement ~~of clericals into other clerical assignments and into semi-professional and professional positions.~~

B. Clerical Evaluation Panel

1. Each Head of a Career Sub-Group will establish panels to evaluate clerical personnel in grades GS-06 and above and those in lower grades who have been with the Agency three years or more.

2. The Heads of Career Sub-Groups will determine, based on the number of clericals and the diversity of ~~technical~~ functions performed by this ^{en} category of employees, if more than one panel is required.

3. The membership of the panel ^{will} ~~should~~ be ~~from~~ employees at least two grades higher than the group being evaluated. However, there ^{may} ~~should~~ be at least one adviser from the grades and/or functional group being evaluated.

4. Members ^{will} ~~should~~ be appointed for specific terms and rotated at staggered intervals. They may be reappointed for more than one term but ^{will} ~~should~~ have a maximum limit of two years that they can serve.

5. Membership ^{will} ~~should~~ be published to ensure that all clerical personnel are aware of the members of their panel.

C. DDA Clerical Advisory Committee

1. The Deputy Director for Administration will establish a Directorate Clerical Advisory Committee to serve as a focal and coordinating point for the activities of the Sub-Group Clerical Evaluation Panels. The membership of the Directorate Clerical Advisory Committee will be comprised of a representative from each Clerical Evaluation Panel. The member will be appointed by the DDA from nominations from the Head of each Career Sub-Group. The chairman ^{person} of this committee will be appointed by the DDA but not necessarily from the participating membership of the Committee.

2. The Clerical Advisory Committee will be primarily responsible for coordinating the activities of the various Clerical Evaluations Panels and ~~for facilitating~~ intra-Directorate communications among the panels. This Committee, through its chairman ^{person}, will work with the Directorate Senior Personnel Resources Board and the top Directorate management in matters pertaining to the clerical career management program.

D. Establishment of Criteria for Evaluation of Clericals

1. Each panel will develop criteria for the evaluation of clericals for promotion, reassignment, training, and ~~conversion to professional status~~. The criteria developed in each Sub-Group panel (or panels) will be submitted to the Head of the Career Sub-Group through the Sub-Group Board.

2. The DDA Clerical Advisory Committee will review the criteria developed in each Career Sub-Group to establish, ^{where appropriate} ~~in so far as possible~~ uniform criteria which ^{will} ~~can~~ be utilized by all the Clerical Panels. If the evaluations are to provide the necessary basis for viable and uniform career management, there must be some common guidelines so that evaluations have equivalent meanings ^{among the} ~~between~~ different components.

E. Competitive Evaluations

1. The Clerical Evaluation Panels will use the established criteria to competitively evaluate at least annually clerical personnel in grades GS-06 and above ^{and} ~~or~~ those employees in lower grades who have been with the Agency a minimum of three years. ^{The lower grades employees who are} ~~These~~ excluded from panel review will be evaluated by their supervisors, who will make ~~appropriate~~ recommendations to the ^{appropriate} ~~authorities~~ ^{panels} for promotions, training, and reassignment.

2. The Panels will competitively evaluate and rank the clerical employees and group them in the following four categories:

- (a) those meriting immediate consideration for promotion or assignment to a position carrying a promotion possibility;
- (b) those who may be considered now for promotion but would benefit from further developmental effort;
- (c) those who are performing satisfactorily but do not merit promotion;
- (d) those whose performance requires improvement in specified respects in order to be ~~trained~~ ^{termed} satisfactory.

3. The panels ^{will} ~~should~~ ^{also} recommend certain training and/or types of assignments needed by individual employees to enhance their career development and recommend to the Head of the Career Sub-Group those qualified employees who should receive consideration for conversion to professional or technical status.

F. Eligibility for Promotion, Reassignment, and/or Conversion to Professional Status

1. Ranking is meaningless without the opportunity to compete on the basis of qualification for higher positions when they become available. Thus, only those employees who are in the top two categories of the clerical competitive rankings will be considered eligible for promotion or reassignment to more responsible positions.

2. Employees in the third category may be considered for reassignment to positions of equivalent responsibility.

^{See attached} 3. ~~Three nominees will be selected from the roster of eligible candidates to fill a vacancy. The selection of a nominee to fill a vacancy will be only from the roster of eligible candidates. If there are not enough eligible candidates available in the Career Sub-Group to fill a vacancy, a Vacancy Notice will be forwarded to the DDA Clerical Advisory Committee who will distribute the Notice to the other~~ ^{each vacancy} ~~for distribution~~

F. Eligibility for Promotion, Reassignment

1.

2.

3. Three nominees will be selected from the roster of eligible candidates to fill ~~ex~~ each vacancy. If there are not enough eligible candidates available in the

Career Sub-Group to fill a vacancy, a Vacancy Notice will be forwarded to the

DDA Clerical ~~For~~ Advisory Committee for distribution to the other Sub-Group

Clerical Panels ~~and/or other Directorates in the~~ and, as appropriate, to other

Directorates.

4. Positions GS-08 and above will be filled on a Directorate basis from among ~~all~~

the ~~all~~ eligibles in each of the Sub-Groups. The Head of the Sub-Group where a

GS-08 and above position is to be filled should submit a Vacancy Notice and his

list of eligibles to the Directorate Clerical Advisory Committee. The Committee

will obtain the lists of eligibles from the other Sub-Groups, select three

nominees and forward the names to the Head of the ~~ex~~ Sub-Group for final

selection. *A/DDA resolves any problems which cannot be*

settled between the Committee and Heads of the Sub-Groups.

Sub-Group Clerical Panels, or to other Directorates in the Agency, for nominations of candidates who are eligible.

5 3. ~~At any time~~ ^{who is not among the three} When an individual, other than one who is eligible and ~~has~~ ^{was} been nominated by the appropriate Clerical Panel, is desired, justification must be forwarded to the Directorate Clerical Advisory Committee who will obtain approval from top Directorate management.

6 3. There ~~will~~ ^{may} be a need for some reassignments where the employees ~~is~~ ^{are} not eligible for promotion but where considerations of personal relationships, the nature of the current job, or health indicate the advisability of a lateral transfer or a reassignment to a lower graded job. Such consideration will be within the purview of the panels to establish eligibility for reassignment.

5 4. No candidates are to be considered for reassignment ^{who} have not been designated by their panels ~~or~~ ^{as} eligible by virtue of performance or some other established basis. A potential candidate for a position should be notified to determine interest and feasibility in being considered.

G. Counseling

1. All clerical employees will be counseled at least annually. This may be done by the Sub-Group Career Management Officer or one of the members of the Clerical Evaluations Panel. Employees who are ranked in the lowest category (unsatisfactory performance) will be counseled within 30 days of the evaluation exercise and as often thereafter as is required to implement and monitor remedial action.

2. The Chairman ^{person} of the Directorate Clerical Advisory Committee will be responsible for arranging appropriate Directorate-level counseling ~~where an employee could receive guidance~~ on a confidential basis when Sub-Group level channels ~~might be~~ ^{are} deemed inappropriate by ^{the employee and the Chairperson}

H. Training

1. The Directorate Clerical Advisory Committee working with the Sub-Group clerical panels will develop and establish minimum training standards for clerical occupations and grade levels. Such training requirements should focus on better performance at the clerical level but not neglect the preparation, as appropriate, of clericals for transition to semi-professional and professional positions. Such training standards would be useful inputs for the Personnel Development Program, which will cover employees at the GS-09 level and up, and for upward mobility planning.

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2. The Clerical Panels should play an active part in making recommendations for training, informing the employees of the training available, and utilizing training ^{its} established criteria, for evaluation of clerical employees.

I. Annual Assignment Preference Forms

1. This form, submitted annually, would provide a sanctioned means for the employees to indicate ^{their} desire for reassignment or training. It would provide a useful input both to the supervisor and to the panel, ~~although there will be a justifiable fear that a supervisor would react unsympathetically to an expressed desire for reassignment.~~ ^{Some employees may} ~~There must be a developed understanding with all concerned that~~ The information on the form is intended as the basis for career development and most effective utilization of the qualification of the clerical employees.

2. The information obtained from such a form ~~would~~ ^{would} also provide a useful basis for the annual counseling session of clerical employees. Desired training and reassignment aspirations can be discussed and recommended courses of action developed.

J. Periodic Surveys of Clerical Personnel

1. Periodic surveys indicating the attitudes of clerical personnel with respect to the operations of the clerical career management program should provide valuable data for the clerical Evaluation Panels, the Career Sub-Groups and the Directorate management.